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Workers' Compensation Medicare Set-Aside Portal (WCMSAP) Registration Process Corporate Account

Version 3.1, 3/31/2013
CMS reserves the right to modify this presentation. To ensure you have the most current version, verify that the version and date on this page match the version and date on the corresponding page of the PDF currently available on <http://www.cms.gov/Medicare/Medicare.html>.

Slide notes

Welcome to the Workers' Compensation Medicare Set-Aside Portal (WCMSAP) Registration Process course.

Note: This module is intended for those entities who will register for a corporate account. A corporate account indicates that the submitter is registering as a corporate entity with an Employer Identification Number (EIN) and will be regularly submitting WCMSA requests.

As a reminder, you may view the slide number you are on by clicking on the moving cursor. Additionally, you can view the narration by clicking the Closed Captioning [CC] button in the lower right hand corner of the screen.

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Disclaimer

While all information in this document is believed to be correct at the time of writing, this Computer Based Training (CBT) is for educational purposes only and does not constitute official Centers for Medicare & Medicaid Services (CMS) instructions for the WCMSAP. All affected entities are responsible for following the applicable CMS instructions found at the following link:
<http://www.cms.gov/WorkersCompAgencyServices/>.

Slide notes

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Course Overview

- Corporate Registration
- Next Steps

**Slide notes**

This course will provide instruction on how to complete a Corporate registration on the WCMSAP and the steps to follow once the registration has been submitted.

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Getting Started

- Register with the CMS
- Identify and assign an Account Representative
 - Initiates new registration
 - Account contact
 - Recipient of Coordination of Benefits Contractor (COBC) notifications and e-mails
 - Cannot be an actual user of the WCMSAP
 - Cannot register for more than one WCMSAP account
- To change your Account Representative, contact the COBC
 - EDI Representative will make the change

Slide notes

Before using the WCMSAP, you must register with the CMS.

In order to register a corporate entity on the WCMSAP, the corporation must identify and assign an Account Representative.

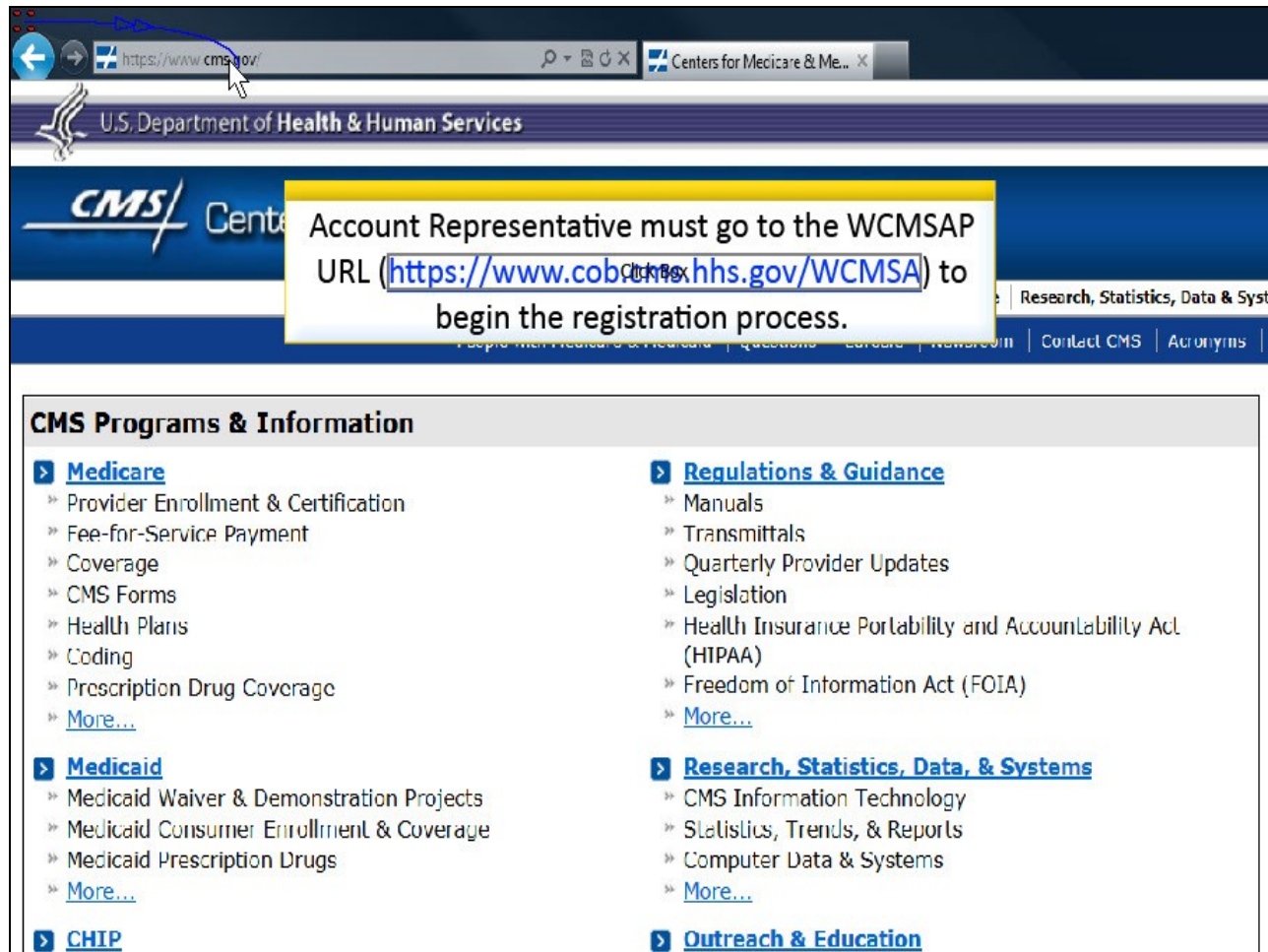
The Account Representative will initiate the new registration for the corporation and provide all of the information requested by the system.

The Account Representative will be your account contact and will be the recipient of Coordination of Benefits Contractor (COBC) notifications and e-mails.

The Account Representative cannot be an actual user of the WCMSAP and cannot register as the Account Representative for more than one WCMSAP account.

If you need to change your Account Representative after completing the New Registration step, you must contact the COBC and a COBC Electronic Data Interchange (EDI) Representative will make the change for you.

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The screenshot shows a web browser window with the URL <https://www.cms.gov/>. The browser tab is labeled "Centers for Medicare & Me...". The page header includes the U.S. Department of Health & Human Services logo and the CMS logo. A yellow callout box with a black border contains the text: "Account Representative must go to the WCMSAP URL (<https://www.cob.cms.hhs.gov/WCMSA>) to begin the registration process." The main content area is titled "CMS Programs & Information" and lists several categories with expandable arrows:

- Medicare**
 - » Provider Enrollment & Certification
 - » Fee-for-Service Payment
 - » Coverage
 - » CMS Forms
 - » Health Plans
 - » Coding
 - » Prescription Drug Coverage
 - » [More...](#)
- Medicaid**
 - » Medicaid Waiver & Demonstration Projects
 - » Medicaid Consumer Enrollment & Coverage
 - » Medicaid Prescription Drugs
 - » [More...](#)
- CHIP**
- Regulations & Guidance**
 - » Manuals
 - » Transmittals
 - » Quarterly Provider Updates
 - » Legislation
 - » Health Insurance Portability and Accountability Act (HIPAA)
 - » Freedom of Information Act (FOIA)
 - » [More...](#)
- Research, Statistics, Data, & Systems**
 - » CMS Information Technology
 - » Statistics, Trends, & Reports
 - » Computer Data & Systems
 - » [More...](#)
- Outreach & Education**

Slide notes

All users must register for a Web portal account on the WCMSAP URL. To create your corporate account, your Account Representative must go to the WCMSAP URL (<https://www.cob.cms.hhs.gov/WCMSA>) to begin the registration process.

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The screenshot shows the CMS website with a browser window zoomed in on the URL bar. The browser address bar displays <https://www.cob.cms.hhs.gov/WCMSA>. The CMS logo and header are visible, including the text "Centers for Medicare & Medicaid Services". The navigation menu includes links for Home, Medicare, Medicaid, CHIP, About CMS, Regulations & Guidance, Research, Statistics, Data & Systems, People with Medicare & Medicaid, Questions, Careers, Newsroom, Contact CMS, and Acronyms. The main content area is titled "CMS Program" and lists various services under Medicare, Medicaid, and CHIP. A zoomed-in view of the browser window is overlaid on the main content, showing the same URL and the CMS logo.

CMS Program

- Medicare**
 - Provider Enrollment
 - Fee-for-Service
 - Coverage
 - CMS Forms
 - Health Plans
 - Coding
 - Prescription Drug Coverage
 - [More...](#)
- Medicaid**
 - Medicaid Waiver & Demonstration Projects
 - Medicaid Consumer Enrollment & Coverage
 - Medicaid Prescription Drugs
 - [More...](#)
- CHIP**


Research, Statistics, Data, & Systems


- CMS Information Technology
- Statistics, Trends, & Reports
- Computer Data & Systems
- [More...](#)

Outreach & Education

Slide notes

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**Workers' Compensation Medicare Set-Aside Web Portal**

Login Warning [Print this page](#)

UNAUTHORIZED ACCESS TO THIS COMPUTER SYSTEM IS PROHIBITED BY LAW

This web site is maintained by the U.S. Government and is protected by federal law. Use of this computer system without authority or in excess of granted authority, such as access through use of another's Login ID and/or password, may be in violation of federal law, including the False Claims Act, the Computer Fraud and Abuse Act and other relevant provisions of federal civil and criminal law. Violators may be subject to administrative disciplinary action and civil and criminal penalties including civil monetary penalties.

For site security purposes we employ software programs to monitor and identify unauthorized access, unauthorized attempts to upload or change information, or attempts to otherwise cause damage. In the event of authorized law enforcement investigations, and pursuant to any required legal process, information from these sources may be used to help identify an individual and may be used for administrative, criminal or other adverse action.

Privacy Act Statement

The collection of this information is authorized by 42 U.S.C. 1395y(b)(5). The information collected will be used to identify and recover past mistaken Medicare primary payments and to prevent Medicare from making mistakes in the future for those Medicare Secondary Payer situations that continue to exist.

Attestation of information

I have submitted all relevant information obtained and/or have knowledge of regarding this claimant, that was generated at any time on or after the Date of Incident (DOI) for the alleged accident/illness/injury/incident at issue, and has been included as part of this submission of the proposed amount for this WCMSA to the Centers for Medicare & Medicaid Services.

The information provided is complete, truthful, accurate, and meets all requirements set forth to use this process; and, I have read and understand all of the Centers for Medicare & Medicaid Services information at <http://www.cms.gov/WorkersCompAgencyServices/>

LOG OFF IMMEDIATELY if you do not agree to the conditions stated in this warning.

[I Accept](#)

[Decline](#)

¹ A Privacy Act system of records is a group of any records about individuals and under the control of any Federal agency from which information is retrieved by the name or other personal identifier of the individual

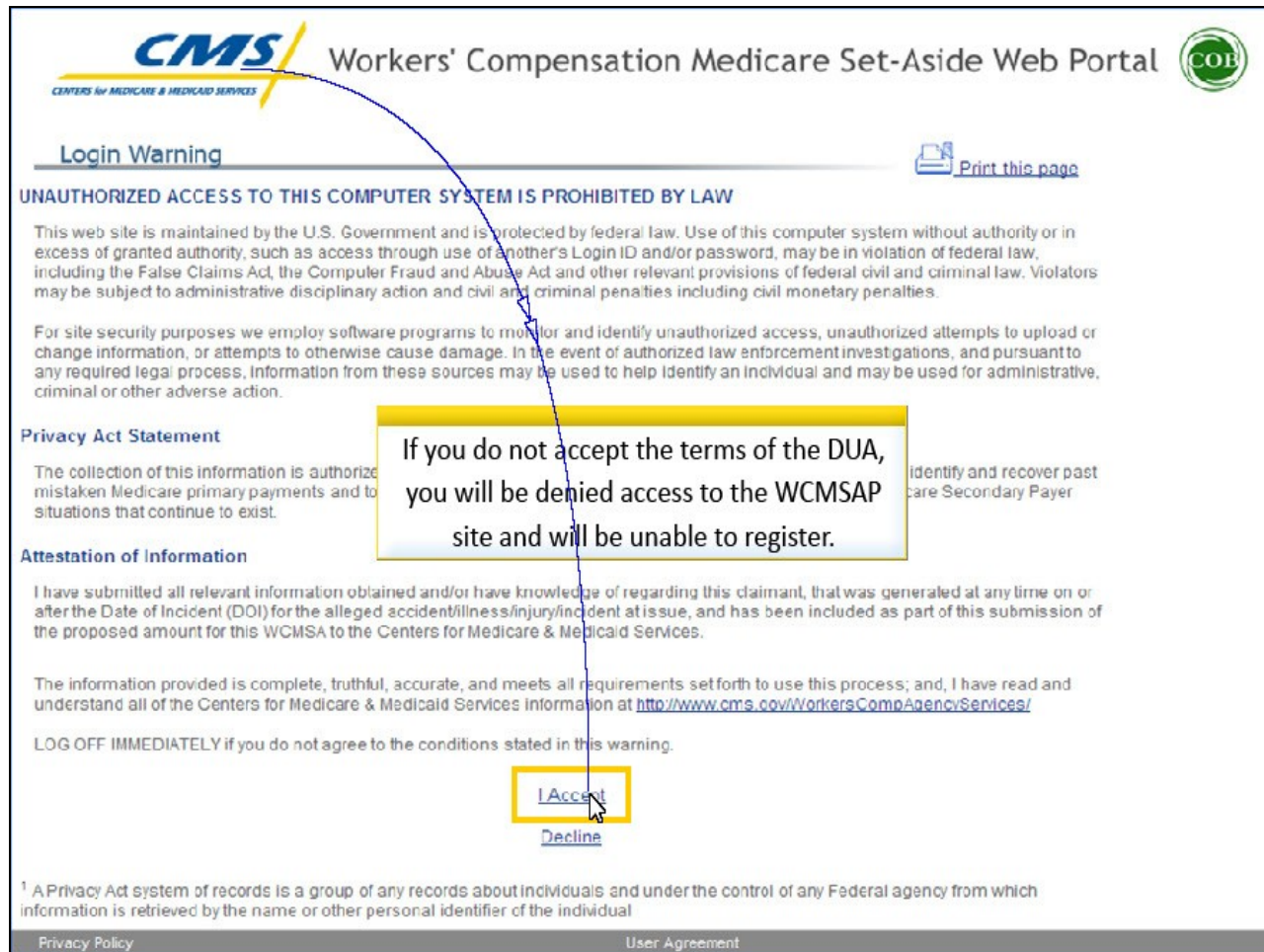
[Privacy Policy](#)[User Agreement](#)


Slide notes


Each time you visit the WCMSAP Web site, the Login Warning page will display the Data Use Agreement (DUA). The DUA provides information about WCMSAP security measures including access, penalty and privacy laws.

You must agree to the terms of this warning each time you access the WCMSAP application.

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CMS **Workers' Compensation Medicare Set-Aside Web Portal** 

Login Warning  [Print this page](#)

UNAUTHORIZED ACCESS TO THIS COMPUTER SYSTEM IS PROHIBITED BY LAW

This web site is maintained by the U.S. Government and is protected by federal law. Use of this computer system without authority or in excess of granted authority, such as access through use of another's Login ID and/or password, may be in violation of federal law, including the False Claims Act, the Computer Fraud and Abuse Act and other relevant provisions of federal civil and criminal law. Violators may be subject to administrative disciplinary action and civil and criminal penalties including civil monetary penalties.

For site security purposes we employ software programs to monitor and identify unauthorized access, unauthorized attempts to upload or change information, or attempts to otherwise cause damage. In the event of authorized law enforcement investigations, and pursuant to any required legal process, information from these sources may be used to help identify an individual and may be used for administrative, criminal or other adverse action.

Privacy Act Statement

The collection of this information is authorized to identify and recover past mistaken Medicare primary payments and to identify and recover past Medicare Secondary Payer situations that continue to exist.

Attestation of Information

I have submitted all relevant information obtained and/or have knowledge of regarding this claimant, that was generated at any time on or after the Date of Incident (DOI) for the alleged accident/illness/injury/incident at issue, and has been included as part of this submission of the proposed amount for this WCMSA to the Centers for Medicare & Medicaid Services.

The information provided is complete, truthful, accurate, and meets all requirements set forth to use this process; and, I have read and understand all of the Centers for Medicare & Medicaid Services Information at <http://www.cms.gov/WorkersCompAgencyServices/>

LOG OFF IMMEDIATELY if you do not agree to the conditions stated in this warning.

[I Accept](#)
[Decline](#)

¹ A Privacy Act system of records is a group of any records about individuals and under the control of any Federal agency from which information is retrieved by the name or other personal identifier of the individual

[Privacy Policy](#) [User Agreement](#)

Slide notes

You must review the DUA and click the [I Accept] link at the bottom of the page to continue otherwise you will be denied access to the WCMSAP site and will be unable to register.

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The screenshot shows the homepage of the Workers' Compensation Medicare Set-Aside Web Portal (WCMSAP). The header includes the CMS logo (Centers for Medicare & Medicaid Services) and the title 'Workers' Compensation Medicare Set-Aside Web Portal' with a COB logo. A navigation bar contains links: 'About This Site', 'CMS Links', 'How To...', 'Reference Materials', and 'Contact Us'. The main content area is titled 'Welcome to the WCMSAP' and contains a paragraph describing the site's purpose for attorneys, Medicare beneficiaries, claimants, insurance carriers, and WCMSA vendors. To the right is a 'Sign into your account' box with fields for 'User Name' and 'Password', and links for 'Forgot ID' and 'Forgot Password'. Below the welcome message is a 'WCMSAP Messages' section and a 'GETTING STARTED' section with a link to 'How To Get Started'. At the bottom, there are two buttons: 'New Registration' (labeled STEP 1) and 'Account Setup' (labeled STEP 2, with a note '(Account ID and PIN required)').

CMS Workers' Compensation Medicare Set-Aside Web Portal **COB**

Centers for Medicare & Medicaid Services

Navigation: About This Site | CMS Links | How To... | Reference Materials | Contact Us

Welcome to the WCMSAP

This site provides an interface for entry of Workers' Compensation Medicare Set-Aside Arrangements (WCMSA) proposals. Attorneys, Medicare beneficiaries, claimants, insurance carriers and WCMSA vendors may use this site to enter the case information directly. The site also provides attorneys, Medicare beneficiaries, claimants, insurance carriers, and WCMSA vendors with the ability to track their submitted cases and the statuses without inquiry to the Coordination of Benefits Contractor (COBC) or the Centers for Medicare & Medicaid Services (CMS).

WCMSAP Messages

This space is reserved for system messages from the Coordination of Benefits Contractor. Check this location for important information regarding system outages, scheduled maintenance and special announcements.

GETTING STARTED

For more information, refer to How To Get Started under the How To menu option.

STEP 1

New Registration →

STEP 2


Account Setup →
(Account ID and PIN required)

Sign into your account
User Name:
[Forgot ID](#)
Password:
[Forgot Password](#)

Slide notes

Once you have clicked on the I Accept link, you will be brought to the Login (Welcome) page. Here you will find various menu options.

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CMS Workers' Compensation Medicare Set-Aside Web Portal 

[Skip Navigation](#)

[About This Site](#) [CMS Links](#) [How To...](#) [Reference Materials](#) [Contact Us](#)

[How To Use This Site](#)

Welcome

This site is for the Workers' Compensation Medicare Set-Aside (WCMSA) application. It provides information on how to use the WCMSAP application. The site also provides attorneys, Medicare beneficiaries, claimants, insurance carriers, and WCMSA vendors with the ability to track their submitted cases and the statuses without inquiry to the Coordination of Benefits Contractor (COBC) or the Centers for Medicare & Medicaid Services (CMS).

WCMSAP Messages

This space is reserved for system messages from the Coordination of Benefits Contractor. Check this location for important information regarding system outages, scheduled maintenance and special announcements.

GETTING STARTED

For more information, refer to How To Get Started under the How To menu option.

STEP 1 **STEP 2**

New Registration → **Account Setup** →
(Account ID and PIN required)

Sign into your account

User Name:

[Forgot ID](#)

Password:

[Forgot Password](#)

Slide notes

"About This Site" navigates to the How to Use This Site link, offering general information on how to use the WCMSAP application.

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The screenshot shows the homepage of the Workers' Compensation Medicare Set-Aside Web Portal. At the top left is the CMS logo with the text 'CENTERS for MEDICARE & MEDICAID SERVICES'. To its right is the portal title 'Workers' Compensation Medicare Set-Aside Web Portal' and a COB logo. A 'Skip Navigation' link is on the far right. A blue navigation bar contains links: 'About This Site', 'CMS Links', 'How To...', 'Reference Materials', and 'Contact Us'. Below this, a dropdown menu for 'CMS Links' is open, showing 'Workers Compensation Agency Services', 'General Medicare', and 'Coordination of Benefits'. A yellow callout box points to this menu with the text: '"CMS Links" provides links to the Workers' Compensation Agency Services page, the Medicare Web site, and the Coordination of Benefits Web site.' The main content area has a 'Welcome to' heading, followed by a paragraph describing the site's purpose for WCMSA participants. Below this is a 'WCMSAP Messages' section and a 'GETTING STARTED' section with two steps: 'STEP 1 New Registration' and 'STEP 2 Account Setup' (noting that an account ID and PIN are required). On the right, there is a login box titled 'Sign into your account' with fields for 'User Name' and 'Password', and links for 'Forgot ID' and 'Forgot Password'. 'Login' and 'Clear' buttons are at the bottom of the login box.

CMS CENTERS for MEDICARE & MEDICAID SERVICES

Workers' Compensation Medicare Set-Aside Web Portal

COB

[Skip Navigation](#)

[About This Site](#) [CMS Links](#) [How To...](#) [Reference Materials](#) [Contact Us](#)

Welcome to

This site provides an interface for entry Set-Aside Arrangements (WCMSA) participants, beneficiaries, claimants, insurance carriers, and WCMSA vendors with the ability to track their submitted cases and the statuses without inquiry to the Coordination of Benefits Contractor (COBC) or the Centers for Medicare & Medicaid Services (CMS).

WCMSAP Messages

This space is reserved for system messages from the Coordination of Benefits Contractor. Check this location for important information regarding system outages, scheduled maintenance and special announcements.

GETTING STARTED

For more information, refer to How To Get Started under the How To menu option.

STEP 1 **STEP 2**

New Registration ➔ Account Setup ➔

(Account ID and PIN required)

Sign into your account

User Name:

[Forgot ID](#)

Password:

[Forgot Password](#)


Slide notes

"CMS Links" provides links to the Workers' Compensation Agency Services, page, the Medicare Web site, and the Coordination of Benefits Web site.

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The "How To..." section provides detailed information on performing the following functions:

Providers' Compensation Medicare Set-Aside Web Portal



[Skip Navigation](#)

- About This Site
- CMS Links
- How To...
- Reference Materials
- Contact Us

How to Get Started

How To Request Your Login ID

How To Request Your Password

How To Change Your Password

How To Reset Your PIN

How To Change Your Authorized Representative

How To Change Your Account Manager

How To Invite Account Designees

Welcome to the WCM

This site provides an interface for Set-Aside Arrangements (WCMSAP) beneficiaries, claimants, insurance beneficiaries, claimants, Medicare beneficiaries, claimants with the ability to track their submitted cases and the statuses without inquiry to the Coordination of Benefits Contractor (COBC) or the Centers for Medicare & Medicaid Services (CMS).

WCMSAP Messages

This space is reserved for system messages from the Coordination of Benefits Contractor. Check this location for important information regarding system outages, scheduled maintenance and special announcements.

GETTING STARTED

For more information, refer to How To Get Started under the How To menu option.

STEP 1

New Registration →

STEP 2

Account Setup →

(Account ID and PIN required)

Sign into your account

User Name:

[Forgot ID](#)

Password:


[Forgot Password](#)

Slide notes

"The How To..." section provides detailed information on performing the following functions: Getting Started, Requesting your Login ID, Requesting your Password, Changing your Password, Resetting your PIN,

Changing your Account Representative, Changing your Account Manager, and Inviting Account Designees.

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CMS Workers' Compensation Medicare Set-Aside Web Portal 

[Skip Navigation](#)

[About This Site](#) [CMS Links](#) [How To...](#) [Reference Materials](#) [Contact Us](#)

[WCMSAP site User Manual](#)

Welcome to the WCMSAP

This site provides an interface for entry of Workers' Compensation Medicare Set-Aside Arrangements (WCMSA) proposals. Attorneys, Medicare beneficiaries, claimants, insurance carriers and WCMSA vendors may use this site to enter the case information directly. The site also provides attorneys, Medicare beneficiaries, claimants, insurance carriers, and WCMSA vendors with the ability to track their submitted cases and the statuses without inquiry to the Coordination of Benefits Contractor (COBC) or the Centers for Medicare & Medicaid Services (CMS).

WCMSAP Messages

This space is reserved for system messages from the Coordination of Benefits Contractor. Check this location for important information regarding system outages, scheduled maintenance and special announcements.

GETTING STARTED

For more information, refer to How To Get Started under the How To menu option.

STEP 1 **STEP 2**

New Registration ➔ **Account Setup** ➔

(Account ID and PIN required)

Sign into your account

User Name:

[Forgot ID](#)

Password:

[Forgot Password](#)

Slide notes

"Reference Materials" provides a link to the WCMSAP User Guide.

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The screenshot shows the homepage of the Workers' Compensation Medicare Set-Aside Web Portal. The header includes the CMS logo and the text 'Workers' Compensation Medicare Set-Aside Web Portal' with a COBC logo. A navigation bar contains links: 'About This Site', 'CMS Links', 'How To...', 'Reference Materials', and 'Contact Us'. A 'Skip Navigation' link is also present. The main content area starts with a 'Welcome to the WCMSA' message. A yellow callout box points to the 'Contact Us' link in the navigation bar, stating: '"Contact Us" displays the following message which provides information on how to contact the COBC.' Below this, a modal window titled 'Contact Us' is open. It contains the following text: 'If you have a program or technical problem involving your WCMSAP submission, contact the COBC EDI Department. EDI Representatives can help you find solutions for any questions, issues, or problems you have. Call the COBC EDI Department at (646) 458-6740 for assistance.' At the bottom of the page, there are two steps for getting started: 'STEP 1 New Registration' and 'STEP 2 Account Setup' (with a note '(Account ID and PIN required)').

Workers' Compensation Medicare Set-Aside Web Portal

Welcome to the WCMSA

This site provides an interface for e-Set-Aside Arrangements (WCMSA) for professionals, claimants, insurance carriers and WCMSA vendors may use this site to...

Contact Us

If you have a program or technical problem involving your WCMSAP submission, contact the COBC EDI Department. EDI Representatives can help you find solutions for any questions, issues, or problems you have.

Call the COBC EDI Department at (646) 458-6740 for assistance.


STEP 1 New Registration →

STEP 2 Account Setup →
(Account ID and PIN required)

Slide notes

"Contact Us" displays the following message which provides information on how to contact the COBC.

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Workers' Compensation Medicare Set-Aside Web Portal



[Skip Navigation](#)

[About This Site](#)
[CMS Links](#)
[How To...](#)
[Reference Materials](#)
[Contact Us](#)

Welcome to the WCMSAP

This site provides an interface for entry of Workers' Compensation Medicare Set-Aside Arrangements (WCMSA) proposals. Attorneys, Medicare beneficiaries, claimants, insurance carriers and WCMSA vendors may use this site to enter the case information directly. The site also provides attorneys, Medicare beneficiaries, claimants, insurance carriers, and WCMSA vendors with the ability to track case information and to communicate with the Coordination of Benefits & Medicaid Services.

Sign into your account

Username:

Password:

[Forgot Password](#)

WCMSAP Messages

This space is reserved for system messages from the Coordination of Benefits Contractor. Check this location for important information regarding system outages, scheduled maintenance and special announcements.

GETTING STARTED

For more information, refer to How To Get Started under the How To menu option.

STEP 1

New Registration →

STEP 2

Account Setup →

(Account ID and PIN required)

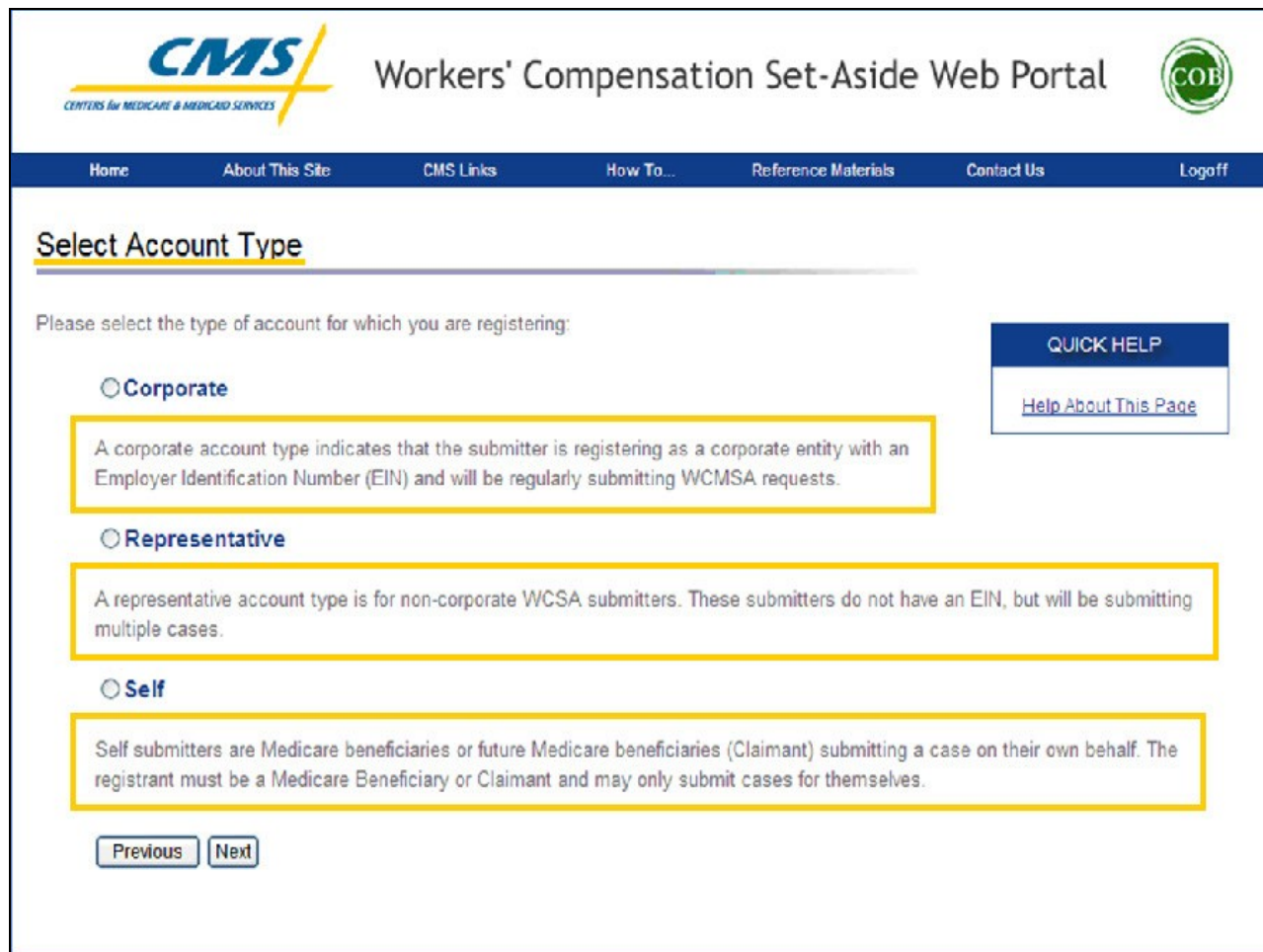
During the Account Registration process, basic information related to your company and your Account Representative are required. To begin the initial registration process, click the **New Registration** button.

Slide notes

The first step in the WCMSAP registration process is Account Registration. During this step, basic information related to your company and your Account Representative are required.

To begin this process, your designated Account Representative must click the New Registration button.

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The screenshot shows the 'Workers' Compensation Set-Aside Web Portal' with the CMS logo and a COB logo. The navigation bar includes links for Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. The main heading is 'Select Account Type'. Below it, a prompt asks the user to select the type of account for registration. Three options are listed: Corporate, Representative, and Self. Each option is accompanied by a description of the account type. A 'QUICK HELP' button with a link to 'Help About This Page' is located on the right. At the bottom, there are 'Previous' and 'Next' buttons.

CMS
CENTERS for MEDICARE & MEDICAID SERVICES

Workers' Compensation Set-Aside Web Portal

COB

Home About This Site CMS Links How To... Reference Materials Contact Us Logoff

Select Account Type

Please select the type of account for which you are registering:

☐ **Corporate**

A corporate account type indicates that the submitter is registering as a corporate entity with an Employer Identification Number (EIN) and will be regularly submitting WCMSA requests.

☐ **Representative**

A representative account type is for non-corporate WCSA submitters. These submitters do not have an EIN, but will be submitting multiple cases.

☐ **Self**

Self submitters are Medicare beneficiaries or future Medicare beneficiaries (Claimant) submitting a case on their own behalf. The registrant must be a Medicare Beneficiary or Claimant and may only submit cases for themselves.

[QUICK HELP](#)
[Help About This Page](#)

[Previous](#) [Next](#)

Slide notes

The Select Account Type page displays. This page describes the differences between each account type.

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Account Type

- Corporate
 - Corporate entity with an Employer Identification Number (EIN)
 - Will regularly submit WCMSAP requests
- Representative
 - Non-corporate WCMSAP submitter with no EIN
 - Will submit multiple cases
- Self
 - Medicare beneficiary/claimant
 - Submit a case for themselves

Slide notes

Users will be required to first specify the type of account for which they are registering.

There are three types of WCMSAP accounts: Corporate, Representative, and Self.

A corporate account type indicates that the submitter is registering as a corporate entity with an Employer Identification Number (EIN). Those registering as a corporate account type will be regularly submitting WCMSAP requests.

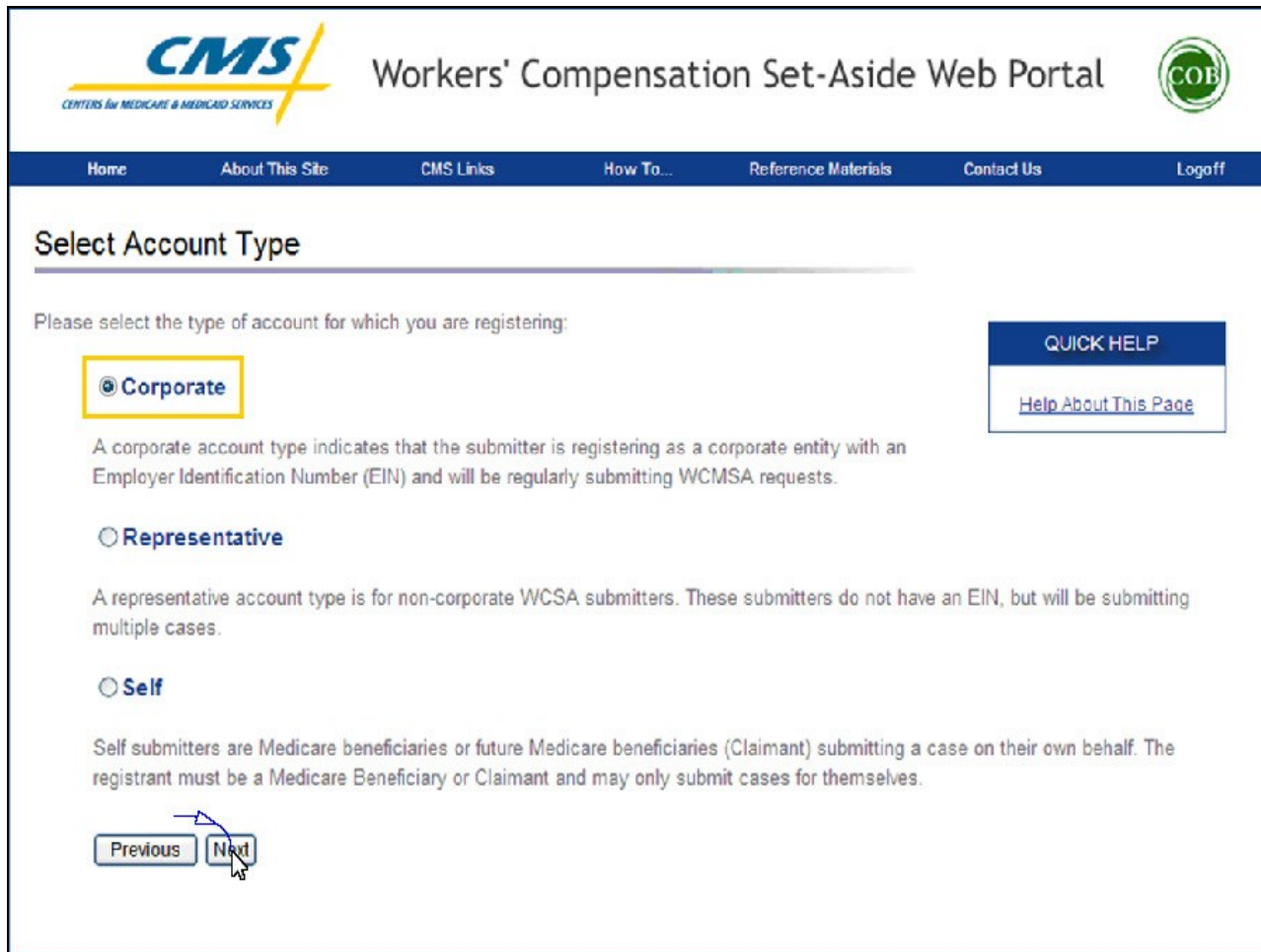
A representative account type is for a non-corporate WCMSAP submitter. These submitters do not have an EIN, but will be submitting multiple cases.

A self-submitter account type is for a Medicare beneficiary or a claimant who has a reasonable expectation of becoming a Medicare beneficiary within 30 months and is submitting a case on their own behalf.

The self-submitter can only submit cases for themselves.

The account type selected will determine both the basic information that is captured during the registration process and the level of vetting that is subsequently undertaken.

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The screenshot shows the 'Workers' Compensation Set-Aside Web Portal' registration page. At the top left is the CMS logo with the text 'CENTERS for MEDICARE & MEDICAID SERVICES'. To its right is the portal title 'Workers' Compensation Set-Aside Web Portal' and a COB logo. A dark blue navigation bar contains links: Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. The main heading is 'Select Account Type'. Below it, a prompt says 'Please select the type of account for which you are registering:'. Three radio button options are listed: 'Corporate' (selected and highlighted with a yellow box), 'Representative', and 'Self'. Each option has a descriptive paragraph. A 'QUICK HELP' box on the right contains a link 'Help About This Page'. At the bottom left are 'Previous' and 'Next' buttons, with a blue arrow pointing to the 'Next' button.

CMS
CENTERS for MEDICARE & MEDICAID SERVICES

Workers' Compensation Set-Aside Web Portal

COB

Home About This Site CMS Links How To... Reference Materials Contact Us Logoff

Select Account Type

Please select the type of account for which you are registering:

☒ **Corporate**

A corporate account type indicates that the submitter is registering as a corporate entity with an Employer Identification Number (EIN) and will be regularly submitting WCMSA requests.

☐ **Representative**

A representative account type is for non-corporate WCSA submitters. These submitters do not have an EIN, but will be submitting multiple cases.

☐ **Self**

Self submitters are Medicare beneficiaries or future Medicare beneficiaries (Claimant) submitting a case on their own behalf. The registrant must be a Medicare Beneficiary or Claimant and may only submit cases for themselves.

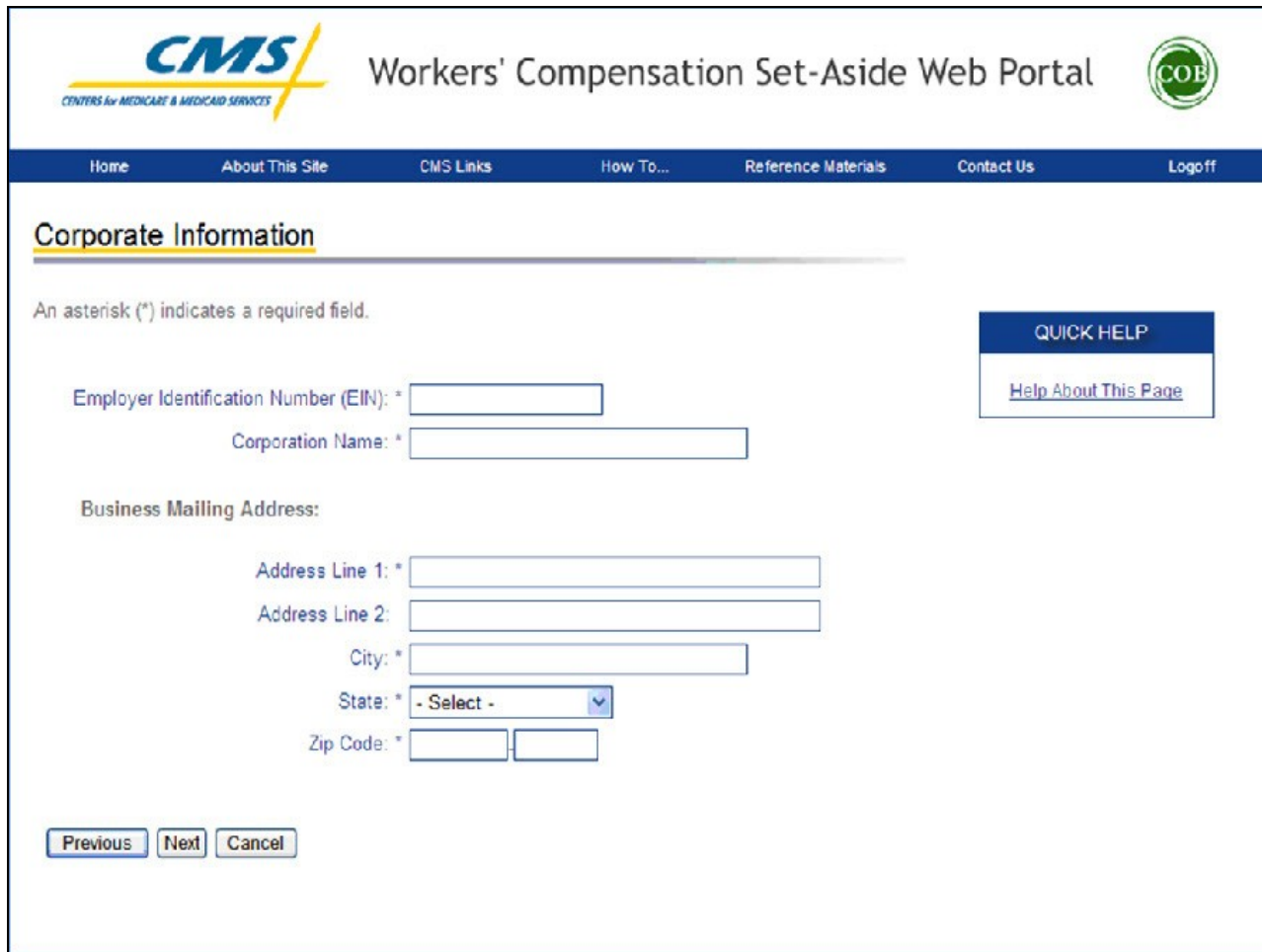
QUICK HELP
[Help About This Page](#)

Previous Next

Slide notes

To register as a Corporate user, select the Corporate button and then click Next.

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The screenshot displays the 'Workers' Compensation Set-Aside Web Portal' interface. At the top left is the CMS logo with the text 'CENTERS for MEDICARE & MEDICAID SERVICES'. To its right is the portal title 'Workers' Compensation Set-Aside Web Portal' and a circular 'COB' logo. A dark blue navigation bar contains links: Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. Below this, the 'Corporate Information' section is titled in blue. A note states: 'An asterisk (*) indicates a required field.' On the right, a 'QUICK HELP' box contains a link 'Help About This Page'. The form fields are: 'Employer Identification Number (EIN): *' with a text box; 'Corporation Name: *' with a text box; 'Business Mailing Address:' with sub-fields: 'Address Line 1: *' (text box), 'Address Line 2:' (text box), 'City: *' (text box), 'State: *' (dropdown menu showing '- Select -'), and 'Zip Code: *' (two text boxes). At the bottom left are three buttons: 'Previous', 'Next', and 'Cancel'.

Slide notes

After the Corporate account type is selected, the Account Representative will be directed to the Corporate Information page.

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The screenshot displays the 'Workers' Compensation Set-Aside Web Portal' interface. At the top, there is a navigation bar with links: Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. The CMS logo is on the left, and the COB logo is on the right. The main heading is 'Corporate Information'. Below this, a note states: 'An asterisk (*) indicates a required field.' On the right side, there is a 'QUICK HELP' button with a link 'Help About This Page'. The form fields are as follows:

- Employer Identification Number (EIN): *** 1234567890 (highlighted with a yellow box and an arrow)
- Corporation Name: *** ABC Company
- Business Mailing Address:**
 - Address Line 1: *** 200 Test Ave (highlighted with a yellow box and an arrow)
 - Address Line 2:** (empty)
 - City: *** Towson (highlighted with a yellow box and an arrow)
 - State: *** MD (highlighted with a yellow box and an arrow)
 - Zip Code: *** 21204 3276 (highlighted with a yellow box and an arrow)

At the bottom of the form, there are three buttons: 'Previous', 'Next', and 'Cancel'.

Slide notes

Enter the EIN associated with the corporation reflected under this WCMSAP registration. If you have more than one EIN, you may submit this registration with any one of those EINs. Enter the corporation's mailing address.

The business address will be used by the COBC to send the Profile Report and any correspondence regarding this Account ID to the corporation. Fields marked with an asterisk (*) are required.

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The screenshot displays the 'Workers' Compensation Set-Aside Web Portal' interface. At the top, there is a header with the CMS logo (Centers for Medicare & Medicaid Services) and the COB logo. Below the header is a navigation bar with links: Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. The main content area is titled 'Corporate Information'. A note states: 'An asterisk (*) indicates a required field.' The form includes the following fields: 'Employer Identification Number (EIN): *' with the value '1234567890', 'Corporation Name: *' with the value 'ABC Company', and 'Business Mailing Address:' which includes 'Address Line 1: *' with '200 Test Ave', 'Address Line 2:' (empty), 'City: *' with 'Towson', and 'State: *' with a dropdown menu showing 'MD'. A yellow callout box points to the 'Next' button with the text: 'Once clicked, information entered on the current page and any previous pages will NOT be saved.' At the bottom left are three buttons: 'Previous', 'Next', and 'Cancel'. At the top right of the form area is a 'QUICK HELP' button with a link 'Help About This Page'.

Slide notes

If you need to cancel the registration process, click cancel. Once clicked, information entered on the current page and any previous pages will NOT be saved. To continue with the registration process, click Next.

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Corporate Information Validation

- System validates each field on each registration page
- If errors are found
 - System displays message indicating what errors were found
 - Cursor is placed on the first field that generates an error
 - User must correct the error before being allowed to proceed
- The system will revalidate the data once it has been entered

Slide notes

The system will validate each field on each registration page for accuracy and completeness.

If errors are found, the system will display applicable error messages on the screen indicating what error condition(s) were found.

When errors are discovered, the cursor will be placed on the first field that generates an error condition. This will either be a required field that is missing data or a field that contains a data error.

The user must correct the error before the system will allow the user to proceed to the next page. Once the data has been corrected, the system will revalidate all data that has been entered.

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CMS
CENTERS for MEDICARE & MEDICAID SERVICES

As long as all information was entered correctly on the Corporate Information page, users will be directed to the Account Representative (AR) Information page.

Home About This Page Contact Us Logoff

Account Representative (AR) Information

An asterisk (*) indicates a required field.

Note: An Account Representative can only have that one role; the Account Representative cannot function as an Account Manager or an Account Designee.

QUICK HELP
[Help About This Page](#)

→ AR First Name: * MI: Last Name: *

→ AR Title: *

→ AR E-Mail Address: *

AR Re-enter E-Mail Address: * ←

→ AR Phone: * - - ext.

AR Fax: - -


Slide notes

As long as all information was entered correctly on the Corporate Information page, the Account Representative (AR) Information page will display next. This page captures information related to the Account Representative

As the Account Representative, you must enter your personal information here. Note: An Account Representative can only have that one role; the Account Representative cannot function as an Account Manager or an Account Designee.


E-mail addresses for each user role will be verified upon entry, and any address matches between the Account Manager, Account Designee or Account Representative roles will be denied. Fields marked with an asterisk (*) are required.

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CENTERS for MEDICARE & MEDICAID SERVICES

Workers' Compensation Set-Aside Web Portal



HomeAbout This SiteCMS LinksHow To...Reference MaterialsContact UsLogoff

Account Representative (AR) Information

An asterisk (*) indicates a required field.

QUICK HELP

[Help About This Page](#)

AR First Name: * MI: Last Name: *

AR Title: *

AR E-Mail Address: *

AR Re-enter E-Mail Address: *



AR Phone: * - - ext.

AR Fax: - -


Slide notes

Once the Account Representative Information page is complete, click the Next button to continue the registration process.

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**Workers' Compensation Medicare Set-Aside Web Portal**

HomeAbout This SiteCMS LinksHow To...Reference MaterialsContact UsLogoff

Registration Summary [Print this page](#)

Account Type: CorporateEdit

Corporate InformationEdit

Employer Identification Number (EIN): #####
Corporate Name: AAAAAAAAAAAAA
Business Mailing Address:
Address Line 1: AAAAAAAAAAAAA
Address Line 2: AAAAAAAAAAAAA
City: AAAAAAAAAAAAA
State: AAAAAAAAAAAAA
Zip Code: ##### - #####

Account Representative InformationEdit



First Name: FIRSTMI: M Last Name: LAST
Title: AAAAAAAAAA
E-Mail Address: AAAAAAAAAA
Phone: ### - ### - #### ext. #####
Fax: ### - ### - #####

PreviousSubmit RegistrationCancel

Slide notes

The Registration Summary page will then display. This page lists all the information that was previously entered. All information should be reviewed and verified before continuing.

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**Workers' Compensation Medicare Set-Aside Web Portal**

HomeAbout This SiteCMS LinksHow To...Reference MaterialsContact UsLogoff

Registration Summary

Account Type: Corporate

Edit

Corporate Information

Edit

Employer Identification Number (EIN): #####

Corporate Name: AAAAAAAAAAAAA

Business Mailing Address:

Address Line 1: AAAAAAAAAAAAA

Address Line 2: AAAAAAAAAAAAA

City: AAAAAAAAAAAAA

State: AAAAAAAAAAAAA

Zip Code: ##### - ####

First Name: FIRSTMI: M Last Name: LAST

Title: AAAAAAAAAAAAA

E-Mail Address: AAAAAAAAAAAAA

Phone: ### - ### - #### ext. #####

Fax: ### - ### - ####

Account Representative Information

Edit

Print this page

You may print this page for your records.

Previous

Submit Registration

Cancel

Slide notes

This page may be printed for your records.


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
CMS Workers' Compensation Medicare Set-Aside Web Portal 

Home About This Site CMS Links How To... Reference Materials Contact Us Logoff

Registration Summary

 [Print this page](#)


Account Type: Corporate 	
Corporate Information 	Account Representative Information 
Employer Identification Number (EIN): #####	First Name: FIRSTMI: M Last Name: LAST
Corporate Name: AAAAAAAAAA	Title: AAAAAAAAAA
Business Mailing Address:	E-Mail Address: AAAAAAAAAA
Address Line 1: AAAAAAAAAA	Phone: ### - ### - #### ext. ####
Address Line 2: AAAAAAAAAA	Fax: ### - ### - ####
City: AAAAAAAAAA	
State: AAAAAAAAAA	
Zip Code: ##### - ####	

Slide notes


To make any corrections, click the Edit button next to the applicable section. Once clicked, the system will display that information entry page.

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CENTERS for MEDICARE & MEDICAID SERVICES

Workers' Compensation Set-Aside Web Portal



HomeAbout This SiteCMS LinksHow To...Reference MaterialsContact UsLogoff

Corporate Information

An asterisk (*) indicates a required field.

QUICK HELP

[Help About This Page](#)

Employer Identification Number (EIN): *

Corporation Name: *

Business Mailing Address:

Address Line 1: *

Address Line 2:

City: *

State: *

Zip Code: *

Slide notes

Add, change, or delete any of the information as needed.

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The screenshot displays the 'Workers' Compensation Set-Aside Web Portal' interface. At the top, there is a header with the CMS logo (Centers for Medicare & Medicaid Services) and the COB logo. Below the header is a navigation bar with links: Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. The main content area is titled 'Corporate Information'. A note states: 'An asterisk (*) indicates a required field.' The form contains the following fields: Employer Identification Number (EIN): * (1234567890), Corporation Name: * (ABC Company), Business Mailing Address: (200 Test Ave), Address Line 1: * (200 Test Ave), Address Line 2: (), City: * (Towson), State: * (MD), and Zip Code: * (21204 3276). A 'QUICK HELP' button with a link 'Help About This Page' is located on the right. At the bottom, there are three buttons: 'Previous', 'Next' (highlighted with a yellow box and a mouse cursor), and 'Cancel'. A blue curved arrow points from the 'Next' button to the 'Business Mailing Address' section.

Corporate Information

An asterisk (*) indicates a required field.

Employer Identification Number (EIN): * 1234567890

Corporation Name: * ABC Company

Business Mailing Address:

Address Line 1: * 200 Test Ave

Address Line 2:

City: * Towson

State: * MD

Zip Code: * 21204 3276

Previous Next Cancel

QUICK HELP
[Help About This Page](#)

Slide notes

Once all corrections have been made, click Next to navigate back to the Registration Summary page.

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The screenshot shows the 'Registration Summary' page of the CMS Workers' Compensation Medicare Set-Aside Web Portal. The page has a blue header with the CMS logo and navigation links: Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. The main content area is titled 'Registration Summary' and includes a 'Print this page' link. The form is divided into two columns. The left column contains 'Account Type: Corporate' with an 'Edit' button, 'Corporate Information' with an 'Edit' button, and 'Business Mailing Address' with fields for Address Line 1, Address Line 2, City, State, and Zip Code. The right column contains 'Account Representative Information' with an 'Edit' button and fields for First Name, Last Name, Title, E-Mail Address, Phone, and Fax. At the bottom, there are three buttons: 'Previous', 'Submit Registration' (highlighted with a yellow box and a mouse cursor), and 'Cancel'.

Registration Summary [Print this page](#)

Account Type: Corporate [Edit](#)

Corporate Information [Edit](#)

Employer Identification Number (EIN): #####

Corporate Name: AAAAAAAAAA

Business Mailing Address:

Address Line 1: AAAAAAAAAA

Address Line 2: AAAAAAAAAA

City: AAAAAAAAAA

State: AAAAAAAAAA

Zip Code: ##### - ####

Account Representative Information [Edit](#)

First Name: FIRSTMI: M Last Name: LAST

Title: AAAAAAAAAA

E-Mail Address: AAAAAAAAAA

Phone: ### - ### - #### ext. ####

Fax: ### - ### - ####

[Previous](#) [Submit Registration](#) [Cancel](#)

Slide notes

Once you have returned to the Registration Summary page, click Submit Registration.

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The screenshot shows the 'Thank You' page of the CMS Workers' Compensation Medicare Set-Aside Web Portal. The page features the CMS logo (Centers for Medicare & Medicaid Services) and the COB logo. A navigation bar includes links for Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. The main content area has a 'Thank You' heading, a 'Print this page' button, and a message stating that the initial registration is complete and a letter with the Account ID and PIN will be mailed. It also outlines the next steps: vetting the information and completing the account setup. A link to the 'Workers' Compensation Set-Aside Welcome Page' is provided at the bottom.

CMS Workers' Compensation Medicare Set-Aside Web Portal 

Home About This Site CMS Links How To... Reference Materials Contact Us Logoff

Thank You

 [Print this page](#)

You have successfully completed the initial registration for the Workers' Compensation Set-Aside Web site. Please print this page for your records.

Next Steps

After initial registration is completed, the information captured will be vetted to verify the Company, Representative or Beneficiary/Claimant is an appropriate submitter. After the vetting has been completed, the registrant will be defined with an Account identification number (ID). After the assignment of an Account ID, a letter will be mailed to the Account Representative captured during registration, with the Account ID and PIN number.

Account Setup

Upon receipt of the mailed Account ID and PIN, the Account Representative will be instructed to return to the Workers' Compensation Set-Aside Web site to complete the account setup. The Account Manager will need to enter the Account ID and PIN on the Account Setup page to begin setup.

[Workers' Compensation Set-Aside Welcome Page](#)

Slide notes

Once the registration has been submitted, the Thank You page displays, outlining the next steps in the registration process.

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Next Steps

- COBC
 - Validates information
 - Letter mailed within two weeks to Account Representative, which contains
 - Account ID and PIN
 - Instructions for setting up account
- Contact COBC EDI Representative if letter is not received within 10 business days

Slide notes

Once your registration application has been submitted, the information provided will be validated by the COBC.

Within two weeks, a letter will be mailed to you, the Account Representative, that contains the Account ID and PIN, along with instructions for setting up the account (which will be completed by the Account Manager).

If a letter is not received within 10 business days, contact a COBC EDI Representative.

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Next Steps

- Account Representative must give the PIN and Account ID/Submitter ID to the Account Manager
 - Information is needed to complete Account Setup
- Account Manager must complete the Account Setup on the WCMSAP
 - Account ID/Submitter ID and PIN Information are needed to begin setup
 - Please see the Account Setup CBT for more information

Slide notes

When the Account Representative has received the PIN and Account ID/Submitter ID, they must give this information to the Account Manager for the Corporate account.

The Account Manager needs this information in order to complete the next step in the registration process which is Account Setup. Account Setup must be completed on the WCMSAP Web site.

The Account Manager must return to the WCMSAP to complete the Account Setup. The Account Manager will need to enter the Account ID/Submitter ID and PIN on the main page to begin setup.

For more information on the Account Setup process, please see the Account Setup CBT.

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Next Steps

- Once the Account Manager has completed Account Setup, an e-mail is sent to the Account Representative
 - Includes a Profile Report and any additional information provided during the Account Setup
 - May take up to 10 business days to receive
- The Profile Report
 - Must be signed and returned to the COBC within 60 business days
 - When returning the signed Profile Report via e-mail, use "WCMSAP Profile Report" in the subject line
 - If not received within 60 days, the account will be deleted on the 60th business day

Slide notes

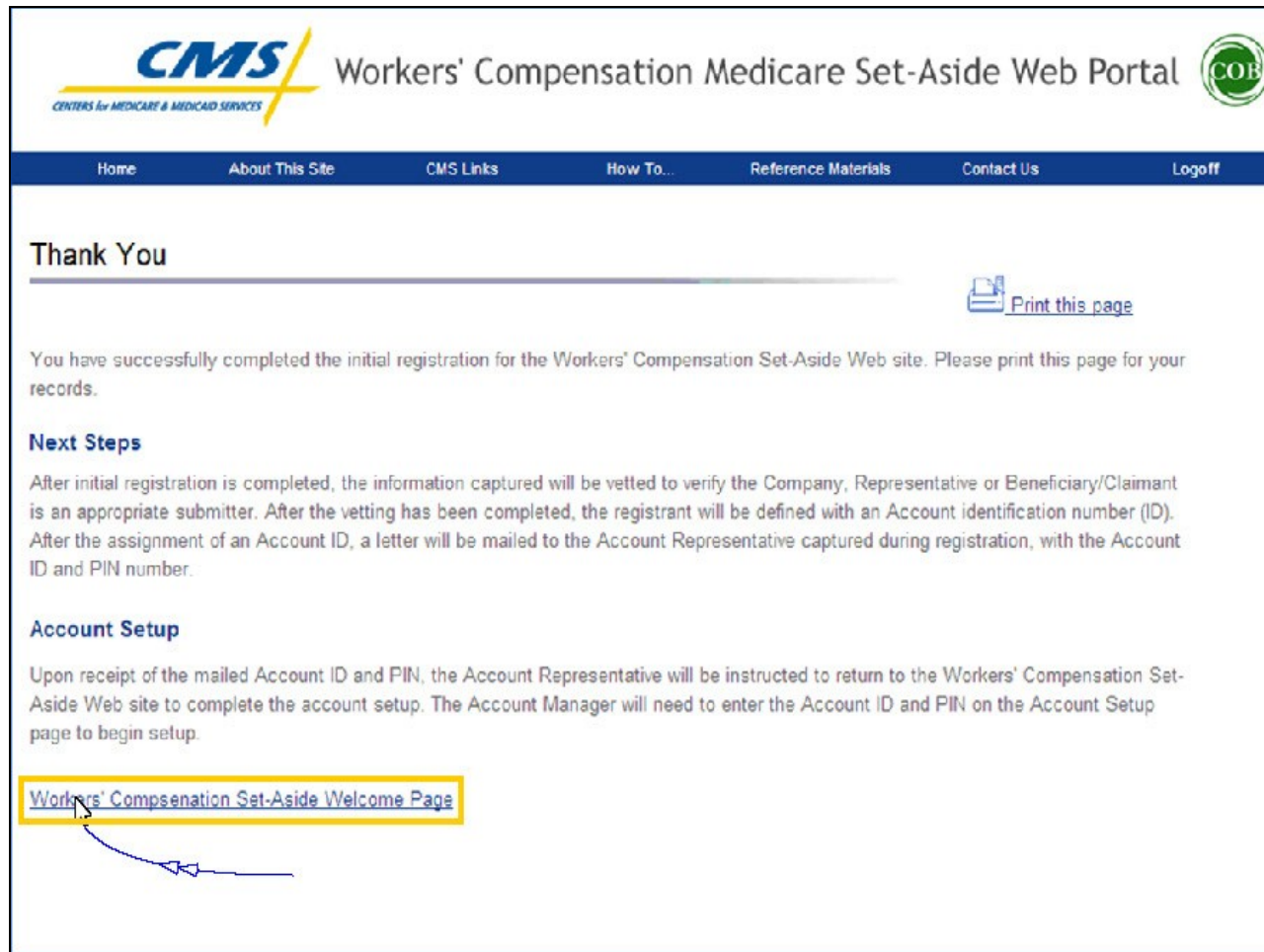
Once the Account Manager has completed the Account Setup, an e-mail notification will be sent to you, the Account Representative.

This notification will include a Profile Report denoting all information previously recorded during registration, and any additional information provided during the Account Setup.

It may take up to 10 business days to receive the Profile Report. You will have 60 business days to review, sign, and return the Profile Report to the COBC. When returning the signed Profile Report via e-mail, use "WCMSAP Profile Report" in the subject line.

If a signed Profile Report is not received within that timeframe, the account will be automatically deleted on the 60th business day. If the account is deleted, you must start the registration process from the beginning.

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The screenshot displays the 'Workers' Compensation Medicare Set-Aside Web Portal'. The header includes the CMS logo (Centers for Medicare & Medicaid Services) and a COB logo. A navigation bar contains links: Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. The main content area features a 'Thank You' heading, a 'Print this page' button, and a message stating: 'You have successfully completed the initial registration for the Workers' Compensation Set-Aside Web site. Please print this page for your records.' Below this, the 'Next Steps' section explains that the information will be vetted and an Account ID and PIN will be assigned, with a letter mailed to the Account Representative. The 'Account Setup' section instructs the Account Representative to return to the website to complete setup using the Account ID and PIN. A link labeled 'Workers' Compensation Set-Aside Welcome Page' is highlighted with a yellow box and a blue arrow pointing to it.

Slide notes

To return to the WCMSAP Welcome page, click the Workers' Compensation Set-Aside Welcome Page link.

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You have completed the WCMSAP Registration Process course. The information in this course can be referenced by using the document at the link below.
<https://www.cob.cms.hhs.gov/WCMSA/help/userManual/WCMSAUserManual.pdf>

Slide notes